Organic market development in Latin America

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Organically managed land by geographical region 2008

- Oceania: 37.6%
- Europe: 24.1%
- Latin America: 19.9%
- North America: 8.9%
- Asia: 6.8%
- Africa: 2.7%

Source: FiBL/IFOAM 2009
The ten countries with most organically managed land 2007

- **Australia**: 12.02
- **Argentina**: 2.78
- **Brazil**: 1.77
- **USA (2005)**: 1.64
- **China**: 1.55
- **Italy**: 1.15
- **India**: 1.03
- **Spain**: 0.99
- **Uruguay (2006)**: 0.93
- **Germany**: 0.87

Million hectares

Argentina, US and Uruguay: Only fully converted areas

Source: FiBL/IFOAM 2009
Conversion status of organically managed land 2007

Source: FiBL/IFOAM 2009

Source: Organic Monitor 2009
Latin America: Growth of the organically managed land area 2000-2007, the leading countries 2007

Source: FiBL 2009
Main land use of organically managed land in Latin America

- Permanent grassland: 3,490,922; 47%
- No details: 2,736,829; 37%
- Cropland, other/no details: 391,774; 5%
- Permanent crops: 663,752; 9%
- Arable land: 155,872; 2%
- Other: 32,302; 0%

Source: FiBL 2009
The ten countries of Latin America with the largest numbers of producers

Source: FiBL 2009
### Latin America: Organic banana area (includes in-conversion)

<table>
<thead>
<tr>
<th>Country</th>
<th>Hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecuador</td>
<td>20'033</td>
</tr>
<tr>
<td>Dominican Rep.</td>
<td>14'953</td>
</tr>
<tr>
<td>Peru</td>
<td>5'092</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>3'409</td>
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<tr>
<td>Mexico</td>
<td>238</td>
</tr>
<tr>
<td>Guatemala</td>
<td>72</td>
</tr>
<tr>
<td>Panama</td>
<td>22</td>
</tr>
<tr>
<td>Jamaica</td>
<td>7</td>
</tr>
</tbody>
</table>

Most organic production from Latin America still for the export (> 90%)

Source: FiBL 2009
Latin America: Organic cocoa area (includes in-conversion)

Source: FiBL 2009
Latin America: Organic coffee area (including in-conversion land) 2008

- Mexico: 239,763 hectares
- Peru: 72,174 hectares
- Colombia: 16,036 hectares
- Dominican Republic: 11,661 hectares
- Nicaragua: 10,875 hectares
- Guatemala: 7,246 hectares
- Ecuador: 4,323 hectares
- Cuba: 3,807 hectares
- El Salvador: 3,743 hectares
- Costa Rica: 1,713 hectares
- Panama: 40 hectares
- Jamaica: 2 hectares

Source: FiBL 2009
Data provided by accredited organic certifiers in Ecuador; Elaboration: Rovayo/Lehmann 2009
Ecuador: Development of the area under organic/transition production 2001-2007

Data provided by accredited organic certifiers in Ecuador; Elaboration: Rovayo/Lehmann 2009
Ecuador: Area under organic production by main products

Data provided by accredited organic certifiers in Ecuador; Elaboration: Rovayo/Lehmann 2009
Organic Market in Latin-American

Main distribution channels:
Local markets (social)
Basquet market (social)
Farmers market (social)
Specialized stores (rich)
Supermarkets (rich)
Organic Market in Latin-American
Conclusions

- Latin America still very dynamic in developing the organic production in their countries.
- Many small farmers are benefited by producing and selling organic products.
- Organic production have showed some reduction because there are competition with other labels as rainforest, crop failures due to climate change, pest and diseases, and low prices).
Conclusions

- The Latin America organic market still focusing to the export.
- However, new organic participative guarantee systems are opening alternatives to develop the local organic markets from small farmers for low income consumers.